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ABSTRACT

This guidebook describes large scale change strategies to develop inclusive approaches to educational policy and practice at the state and district levels. The information was developed under the auspices of a 5-year federally funded project, "The Consortium on Inclusive Schooling Practices," which gathered and synthesized information about systemic change related to the incorporation of students with disabilities in general education systems. The project included in-depth work in three states over 4 years and also involved collaboration with individuals involved in systems change efforts focused on inclusive schooling practices in 18 other states. Individual sections of the guide focus on the following aspects: (1) an introduction to the defining elements of the approach; (2) developing inclusive philosophy, policies, structures, and practices; (3) capacity building; (4) approaching change systemically; (5) linking change to policy; (6) using general education as a context; and (7) pitfalls and difficult situations. A summarizing table lists the strategies and challenges addressed across key areas of the large-scale change framework. (DB)

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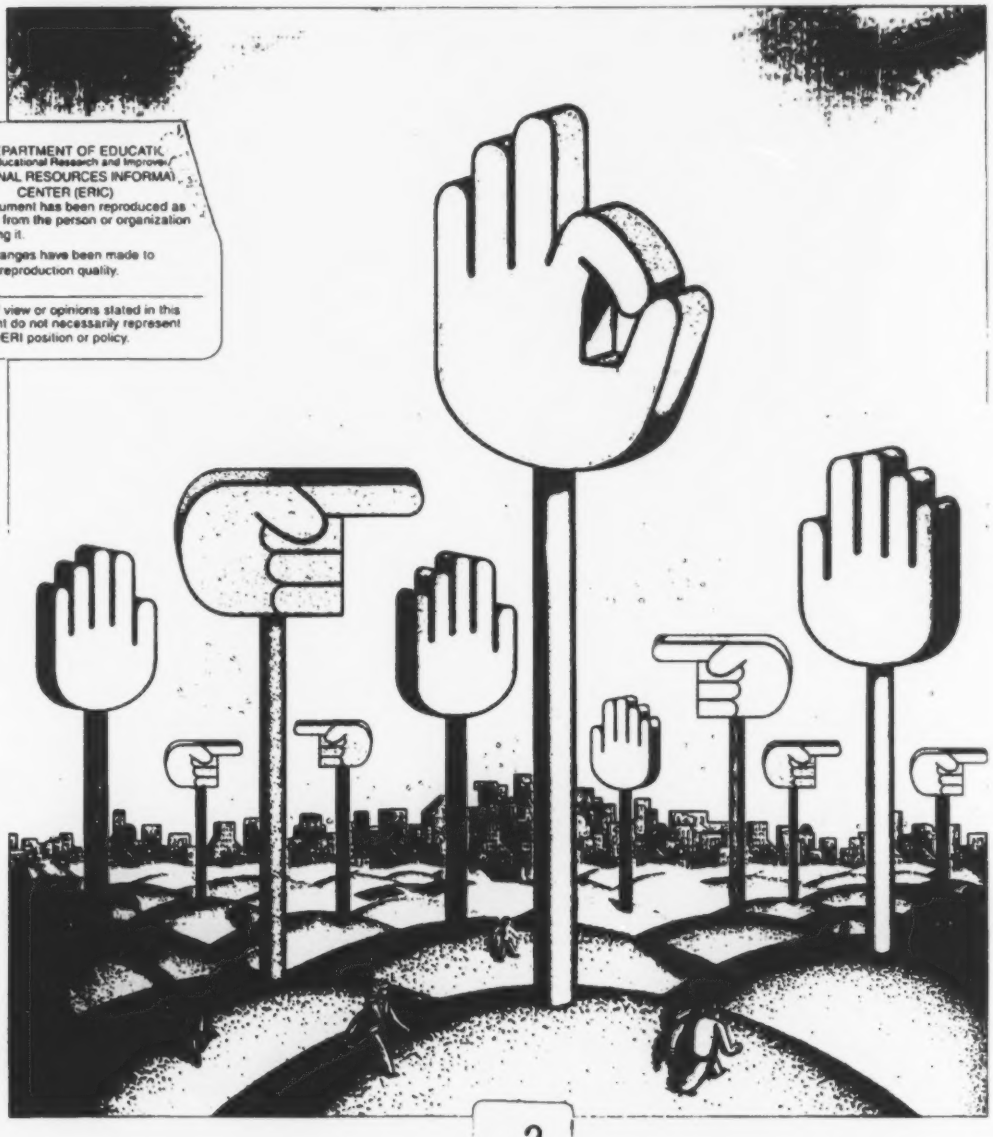
Pathways to Inclusive Practices

Systems Oriented, Policy-Linked, and Research-Based Strategies that Work



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CONSORTIUM ON INCLUSIVE SCHOOLING PRACTICES

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Introduction

This guidebook was developed for parents, practitioners, administrators, and policy-makers seeking to make schools and classrooms more responsive to the educational needs of *all* students, including those with disabilities. Our specific intent is to share information that can help others think about and advocate for inclusive approaches to policy and practice at the state and district level. We focus on large-scale strategies that have changed the way that states, districts, and schools think about services, and the way they use resources to ensure that all children and youth, including those with the most significant disabilities, are meaningfully included in neighborhood schools.

With this as our focus, we also want to be clear about what is *not* addressed in this booklet. We do not focus on change strategies at the individual student level, nor do we provide detailed information about inclusive classroom-based support strategies. Many others have done an excellent job of that, and the reader interested in this type of information is referred to the Resource list at the end of this guidebook.

The information in this guidebook was developed under the auspices of a federally funded project called the *Consortium on Inclusive Schooling Practices*. This five-year project encompassed a variety of activities that shared a common focus —gathering and synthesizing information that will assist others in their efforts to develop more inclusive educational systems (cf., McGregor & Vogelsberg, 1998). During the project period, we gathered a considerable amount of information about promoting systemic change related to the incorporation of students with disabilities in general education systems. Our activities included in-depth work in three very different states over a period of four years. In addition, we collaborated with individuals involved in systems change efforts focused on inclusive schooling practices in eighteen

other states across the country. From these various information sources, we developed a framework for thinking about large-scale change, documented strategies that contribute to changes at the state and local level, and developed some theories about why certain approaches may work better than others. Information derived from this framework and our implementation activities provide the information and experience base for what is shared in this guidebook.

Defining Elements of Our Approach

To understand how the information in this guidebook might assist you in your state and community, it is helpful to understand the elements and strategies that grounded the *Consortium's* approach to supporting inclusive policy and practice. No single element stands alone. Rather, we think the elements of this guiding framework are interdependent and mutually influential. They are as follows:

- ☐ **Develop Inclusive Philosophy, Policies, Structures, and Practices.** We defined inclusion not just as a place or a method of delivering instruction, but as a philosophy that undergirds the entire educational system. Inclusion is part of the culture of a school, defining how students, teachers, administrators, parents and others view the potential of children (National Association of State Boards of Education, 1990).
- ☐ **Build Capacity.** For large-scale change to occur, capacity must be developed within and across organizations. Capacity building involves developing the knowledge and skills of those at all levels and in all areas of the organization, creating supporting structures and policies, providing resources, and establishing mechanisms to continually evaluate progress.
- ☐ **Approach Change Systemically.** We focused on the interdependence among the various systems and parts of systems that provide services and supports to children and youth with and without disabilities. Change in one area often affects what occurs in another. In addition, effective change proceeds from an understanding of the culture of the system. We reasoned that promoting coherence among structures, policies, and practices would produce the most durable and widespread changes in the states we were supporting.
- ☐ **Link Change to Policy.** Improvement in the services, supports, and outcomes for students with disabilities is

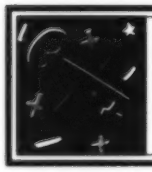
dependent on altering the policies that drive both general and special education. Change must be explicitly linked to policy, and policies must be inclusive in their intent and implementation.

- ☐ **Use General Education as the Context.** Inclusive learning communities should not be considered solely a special education agenda. General education structures, practices, and curriculum should serve as the context within which individualized services and supports are delivered to all children, including those with disabilities.

Given these values as our framework, we feel that what best characterizes our work, and the information in this guidebook, is its focus on policy-linked, large-scale change. We hope our lessons learned will foster conversations that will lead to changes that benefit children and youth with disabilities, including those with the most significant needs.

Develop Inclusive Philosophy, Policies, Structures, and Practices

The strategies described in this section provide the foundation for inclusive practices to occur. They help individuals, groups, and organizations think inclusively and develop policy-linked structures and practices to support large-scale change.



Key Strategy
Frame policy language and intent inclusively

Policies that reflect an inclusive philosophy typically begin with a statement affirming the value of diversity to our schools and society. When diversity is considered a positive and enriching characteristic, rather than a problem to solve, the expectation is established that programs must be designed to meet the needs of the entire student population, including those with disabilities. For example, one state included the following language in their state department of education policy on inclusion:

> *"Full inclusion means that all children must be educated in supported, heterogeneous, age-appropriate, natural, child-focused classroom, school, and community environments for the purpose of preparing them for full participation in our diverse and integrated society."*

Such wording provides an essential launch point for changing expectations, supports, structures, and practices.

Key Strategy

Address barriers and resistance issues

Many state and district programs operate within an environment of policies, structures, and practices that create barriers to inclusion. Sometimes, these barriers can be attributed to turf battles, ingrained relationships, and/or nonuse of current research-based information. In other situations, long-standing practices simply have never been questioned or examined with an inclusive lens. Consider, for example, the impact of the following practices which, on the surface, may appear unrelated to the issue of inclusive schooling practices:

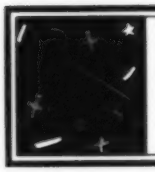
- ☐ Teachers who make announcements in class that publicly identify students who are eligible for free/reduced lunch;
- ☐ The use of separate school schedules, classrooms, events, seating arrangements, and transportation systems for students with disabilities;
- ☐ Failure to actively encourage parents of students with disabilities to become involved in the school PTA, supporting instead, a separate "parent group" for families that have children with disabilities; and/or
- ☐ The categorical structure of most state departments of education, resulting in the physical and programmatic separation of programs such as special education, Title I and English as a Second Language from those focused exclusively on general education.

In fact, these practices reflect the lack of consideration of how daily practice, policies and procedures can reinforce difference and nurture separation based on a programmatic label.

As a change agent, it is essential that you discover the core issues and philosophy affecting educational policies, structures and practices. We have found it possible to identify barriers to inclusion by critically examining fundamental beliefs and practices in the areas of school governance, funding, personnel development and instructional practice that occur within the general education system. Barriers are often tangential to issues of disability. In one state, for example, administrators were concerned about disaggregating state achievement data more so because it would reveal pronounced racial disparities than inequities in performance of students with disabilities. At the district level in another state, an unwillingness to utilize co-teaching arrangements to support students with diverse needs in the general education classrooms was rooted

not in state certification policy, but rather, in a struggle for control and power among administrators.

Change begins first by recognizing where the barriers and resistance exist. Do the issues rest with turf, inadequate teacher preparation, insufficient information about general education practices or policy requirements for special education? Are there ingrained patterns of poor communication or wary relationships, or perhaps ineffectively implemented interagency agreements? By revising policies, altering structures, and improving practices that affect the organization and delivery of services and supports to all students, including those with disabilities, it is possible to address barriers that affect both access and quality.



Key Strategy

Be intentional about broadening representation at the table

Change agents should ensure that many voices are at the table as plans related to systemic reform and inclusionary practices are developed. This means that when conversations about service delivery occur, representatives from curriculum and instruction, certification, transportation, parent groups, and students should be participants. The logistical demands of including these various representatives should not be minimized. Yet, when solutions to the issues are generated by a group in which all are represented, they are more likely to be seen as workable when the implementation process begins.

To take this a step further, conversations about how current policies, structures, and practices are affecting professionals, children and families, and communities must include representation from those outside of the school who also contribute to the service delivery system. Interagency agreements are commonly written between agencies mutually involved with school-aged children, but consistent implementation is less predictable. Bringing partners from other agencies to the table can expand the base of resources and create greater cooperation and coordination across human service systems. In one state, the Developmental Disabilities Planning Council was included in both the planning and implementation of focus groups to assess state perception of the current educational service system. In this state and others, representatives from social services and mental health collaborated with the school district to address service coordination, funding, and support issues for students with

disabilities who also received services from these agencies.

These experiences suggest that broadening the membership of groups dealing with change in service delivery practices not only increases buy-in, but also makes it more likely that "emissaries of change" who take back ideas and concepts can, in turn, affect the planning and actions within their own organizations.

Build Capacity

In this section we describe strategies that collectively we found useful in promoting inclusive practices and large-scale change. Capacity building strategies focus on building knowledge, skills, and supporting structures within and across organizations. They create the conditions necessary for inclusion to happen at the classroom, school, and district level.

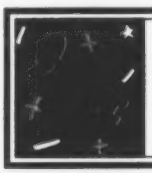
Key Strategy
Create inclusive staff development systems

Staff development programs represent one critical strategy for building capacity. An inclusive approach to staff development brings both general and special education teaching staff together to work on issues associated with meeting the needs of all students in general education classrooms. This approach lends itself to establishing common instructional practices that are aligned with an inclusive school philosophy.

Positive outcomes are associated with the practice of "merged" staff development at both the state and local levels. At the state level, this can been seen where state-funded training and technical assistance entities, as well as professional development schools, are structured to address issues of inclusive educational practice. At the district and building level, policies, schedules, and funds are coordinated so that building based teams, comprised of general education, special education, and administrative personnel, are able to participate in professional development activities. Such efforts at the state and local level help to ensure that everyone involved in changing practices hears the same message, is exposed to the same

base of information, and has similar opportunities to learn from others outside their own discipline.

Some of the most effective forms of professional development are job-embedded, linked to the school improvement plan, and delivered during the school year by a respected leader in the school who has the ability to provide in-class support for the teachers as they try new skills. Quality professional development takes time—time to provide supports to staff, time for teachers to collaborate with one another, and time for individual teachers to learn and practice new skills.



Key Strategy
Promote co-teaching

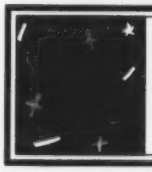
Co-teaching is a powerful approach for supporting student access to the general education curriculum. It also serves as a powerful strategy to foster more inclusive service delivery because it becomes possible for teachers with complementary areas of expertise to draw from a larger base of instructional strengths. For co-teaching to be a useful tool for educators at the local level, it is essential that teachers have the time to plan with their instructional partners, that they receive training on the various approaches to co-teaching, and that changes in roles and responsibilities that occur as a result of co-teaching have administrative support.

At the state level, certification, student-staff ratios, and funding practices must be evaluated and, if needed, revised to enable districts the flexibility to assign general and special education staff to the same class of students with and without disabilities.

Key Strategy
Leverage administrative supports

Administrative support is critical to the process of change and the promotion of inclusive schooling practices. Our findings and experience suggest that time and effort must be dedicated to informing state boards, state agency heads, district administrators, and school board members about key issues and

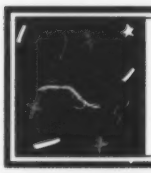
outcomes associated with moving toward inclusive schooling practices. Most district administrators and school board members don't want to know every little detail, but they do want to know the game plan. Keep them informed through at least annual presentations on your efforts, and more frequently with administrative (one-page) briefing reports. Videotapes and press releases, as well as co-presenting with parents of students with and without disabilities, creates important positive images for school board members and those less familiar with school and student level supports. If changes are to be sustained over time they cannot be dependent upon a specific person who may be a catalyst for change in practice. Policy-based, organizational support is key to ensuring that a vision and its supporting structures and practices are embedded throughout an organization and will remain long after key change agents are gone.



Key Strategy
Use internal resources

It is tempting to bring in outside "experts" when introducing an innovation such as inclusive schooling practices into a state or district. While this may be effective in creating initial interest, it is critical that states and districts explore existing resources, talents, and knowledge within their own organizations rather than becoming dependent upon outside consultants. People within an organization are less costly, are generally quicker to access, and have the advantage of understanding many of the state and local contextual issues that can affect the selection and impact of strategies/solutions. Human and fiscal resources exist at all levels of an organization. In one state, teachers in a school district that had successfully adopted an inclusive service delivery model served as training and technical assistance providers to other districts though a regional funded network. Some of these teachers ultimately changed jobs and became consultants for the state education department. In another district, a school known as an "early adopter" of inclusive educational practices, became a mentor site for schools new to inclusive education.

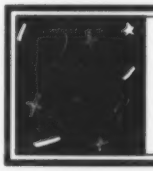
Accessing and leveraging these resources often requires that administrators think creatively. As a change agent, it is your job to help organizations keep goals in sight and clearly defined so that conversations and action planning reflect an inclusive, solutions-oriented approach.



Key Strategy
Leverage external resources

For durable change to occur, it is often helpful to look across departments, to colleges and universities, and to other state and local organizations to discover knowledge and talent that can support inclusive practices. As you seek reliable sources of support, make sure that those who provide technical assistance have both a sustained interest and sufficient understanding of the issues to be an effective support. "Drive-by" technical assistance doesn't work and those who have "walked the talk" will offer the greatest credibility to those with whom you are working. The best solutions tend to arise from a deeper understanding of the local context and conditions. While an external catalyst is often helpful in getting change started, those involved in the organizations and systems on a day-to-day basis are often best suited to lead the on-going conversations about workable approaches and the priorities for change.

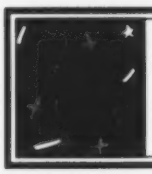
External resources can be leveraged in many ways. For example, a high school teacher with experience in providing inclusive education was deployed two days per week as a cross-building inclusion specialist in one district. In another state, professional development schools were created with a local university to address issues associated with inclusive education. In this situation, pre-service teachers were taught the value and skills necessary to design high quality lessons for all students. Administrators learned to evaluate their teachers on their ability to bring students from diverse groups to high levels of learning, consistent with state and local standards.



Key Strategy
Use data to make decisions

Data take many forms and may or may not be available from organizations in useful formats. A useful role for change agents is to convert data into user-friendly formats for use in launching discussions about inclusive practices. Charts that show student placement patterns, performance data by school or grade, recurring themes from interviews with state or district personnel, and/or

analyses of student portfolio data provide authentic, useful information for decision-making. Regularly scheduled meetings with broad representation provide a forum in which data can be regularly reviewed, ensuring that interpretations are accurate and that proposed actions will make sense for the context. These meetings provide an opportunity to highlight discrepancies between current policies, practices and outcomes and the stated goals of the organization. This discrepancy can be used as a change lever.



Key Strategy
Market your success stories

The importance of marketing the concept of inclusion cannot be underestimated. Create and charge work groups with the responsibility for planning, introducing, and marketing the concept of inclusion. Work with local newspapers, websites, and advocacy groups to publicize success stories of individual and organizational accomplishments from the state and local levels. Visual portraits of change (multimedia or photo based) help create images with an impact. A brief message ("sound bite") is essential and should be repeated in all marketing materials. For example, "*Success Leads to Success*" is an example of a statewide campaign that recognized exemplary school improvement initiatives and provided funds for staff from other districts to observe site activities, buy materials, and attend conferences. Another example came from a district that used the message "All Children Can Learn" to signal their commitment to high standards, diversity, and inclusion. The focus of marketing materials to promote inclusive practices should be the connections to general education, quality practices, and the mission/core values of the organization.

Key Strategy
Process matters

In working toward capacity building, it is essential that you connect your efforts to the priorities identified by the state and district. It is often possible to embed issues of inclusion, diversity, equity, access, and quality within ongoing program improvement discussions.

While many argue that the change process should begin with establishing a common vision, we have identified situations in which it was possible to get at issues of mismatched perceptions and the need for a coherent vision within the context of other discussions. Involving states and district administrators in analyses of policies, structures, and practices in core policy areas (funding, governance, curriculum, assessment, accountability, professional development) creates a situation within which critical questions about inclusion can be asked and decisions made that support capacity building within the system. For example, asking "Does the funding formula create incentives for excluding students with disabilities from general education?" provides a launch point for analysis and change.

In some cases it is helpful for a change agent to support a "quick fix" of a local issue as a means of building credibility and trust for more substantial issues that require enduring change. In other cases, simply being accessible for questions and at the table for planning and problem solving begins the process of promoting critical inquiry and change from within. Whether working with state or district level administrators, evidence suggests that written action plans specifying the *"who, when, how, and with what resources"* are necessary for effective communication among all the partners involved in the change process. At the state level, plans can take the form of audit reports and study session documents. At the district and building level, effective action plans are grounded in assessments of policies, structures, and practices.

At both levels of the system (state and district), participant perspective of status, needs, priorities, and strategies were central to crafting the change plan. The *Consortium* utilized the strategy of combining critical questioning, i.e., *"the balcony view"* (McRel, 2000) with technical support, to promote inclusive thinking, policies, and practices. As a change agent, you can adopt these same strategies and adjust them as necessary to fit your existing resources and contexts.

Key Strategy
Understand and use the school year cycle

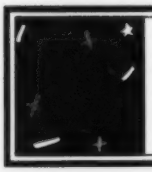
Efforts to create change, particularly in large systems, can stall because objectives and activities are not appropriately sized for the available time and/or resources. Information we have gathered suggests it is important to "plan and do" in the same school

year. In setting goals with teams at the state and district level, it is important to create "*stretch goals*"—goals that are challenging, but not out of reach. It is also helpful to write action plans during the summer with an eye toward completing the action steps in the fall. Use the plans in the spring to evaluate the progress of teachers, administrators, and students prior to revising the plan the following year.

The focus of the "plan and do" action plan should be to promote inclusive thinking, policies, and practices. The press should be for actions, rather than planning. Keep the focus on the integration of policies, resources, and structures. While recognizing that small demonstrations of the effectiveness of a new approach may be necessary, our collective experiences strongly discourage the overuse of the "*special project*" approach to change. These isolated efforts can fragment systems and create time-, person-, and funding-limited services and supports.

Approach Change Systemically

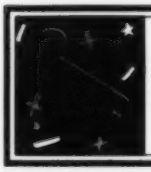
This section represents our findings about how to influence the course of action in large systems. The strategies address the interdependencies within systems and ways in which you can think about creating coherence to produce durable, widespread change.



Key Strategy
Learn the context

School systems and communities have a culture of their own that includes structures, history, politics, a value base, and demographics. To effectively create systemic change, we have found it invaluable to begin with an analysis of the state and district context. This information can inform your selection of a technical assistance approach, the specific areas that are targeted for change, and the support strategies you use.

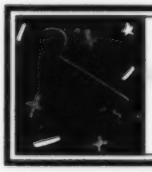
Talk with individuals who work in or are influenced by the system of services, gather and analyze publicly available information and policy documents, test your understandings in structured and unstructured ways, and then plan your approach. Don't reinvent the wheel. A mismatch between your approach and the context can derail even the most reasoned thinking.



Key Strategy
Lead with your strengths

When attempting to introduce a new approach to practice, it is wise to choose people and organizations who have a history of progressive thinking and risk-taking. Investments in such people and settings help create success stories that can be leveraged more broadly. We recommend that strengths be identified and used in a strategic manner. To be strategic means to be planful—planful in terms of who you align with, how you constitute your work groups, which obstacles should be tackled first, which issues are best avoided, how to promote buy-in, and how to market your successes.

Once a change in practice and/or policy has been introduced in one setting, a "ripple effect" across individuals, buildings, districts, and across departments at the state level can often be seen. In one state, for example, efforts to embed inclusive practices in a statewide professional development system increased the number of participating districts from 3 to 14 over a three-year period. This ripple effect helped create a more widespread set of expectations that inclusive practice was the norm, rather than simply an isolated pilot project.



Key Strategy
Ground change in local priorities

District officials typically want to have control over the rate and targets for change. There in an increasing pressure for any instructional change that is adopted by schools to be credible to both professionals (i.e., there is a research-base to substantiate the effectiveness of the approach) and the community as a whole. It is critical to consider the culture of the town and the culture of the district in selecting what to change, as well as how quickly to change. In order to avoid becoming out of sync with the opinions and preferences of the community, it is necessary to understand what is important to them, and how an innovation might coexist with practices that the community values.

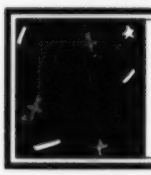
Learning what the real priorities are begins with relationship building. Relationships will create opportunities for access to people and information, both of which will help you understand not only what the issues are, but why they are a

priority. Our experience affirms the value of discarding the "expert" role in favor of participant observer. Listen, learn, then recommend. Make sure your perception and your recommendations match the context, the priorities, and available resources of the system. The nature and the rate of change will be directly affected by your ability to develop a sound match.

Key Strategy

Focus concurrently on levels and components of the system

To ensure success, it is important to understand the interdependent nature of systems. This means that you need to work with individuals and organizations at different levels of the system (building, district, state) and also focus on the components within each level (professional development, curriculum, funding, certification/licensure, assessment, accountability). For example, we found that once district officials understood that general education teachers were required to teach students with disabilities in their home schools and classrooms, and that special education teachers were required to understand state approved standards and/or curriculum, they actively worked for changes in teacher preparation that would enable new teachers to be ready for these responsibilities. Several districts with whom we worked told state university partners they would not hire their graduates unless the graduates were prepared to teach in inclusive classrooms. Change agents can facilitate conversations among schools and universities that can create the pressure for change to occur.



Key Strategy

Focus on larger units of analysis

For sustainable change to occur at the individual school and student levels, state and district systems need to be the focal point of the change process. It is important to work within the context of the district improvement plan and to focus on inclusion within broader reform initiatives throughout the school, the district, and the state.

The *Consortium* worked with "feeder paths" in each district—identifying an elementary school that fed into a middle school that fed into a high school. This allowed

us to create a coherent set of inclusive practices across buildings such that the way in which student services were provided did not change as students moved from one building to the next. Often, issues across these three schools surfaced that required policy changes at the district level. A systemic effect occurs when the policy changes associated with this cross-site model are applied to other buildings throughout the district.

In our collective experiences, the size of the district can affect capacity building results—both positively and negatively. In large suburban or urban districts, it is relatively easy to "bury" a pilot project, to test it out, and if it is successful, argue for its expansion. Once a practice has been established in a system, it is often possible to sustain and broaden efforts with little resistance. However, in these larger settings, it is often more difficult (because of the complexity of the system itself) to gain the initial entrée to schools and to obtain the degree of cooperation and flexibility needed for substantive demonstration efforts. In many ways, educationally significant changes in urban districts represent a "drop in the bucket" for them relative to other, more pressing issues such as teacher turnover, violence, funding, and litigation. Recognizing these competing realities requires that positive results be well marketed, that efforts to expand the initiatives be systematic, and that links to existing district and school resources be clearly established.

In contrast, smaller and rural districts have less bureaucracy and it is often faster and easier to introduce a pilot demonstration (e.g., inclusive service delivery model) into their context. Because of their smaller size and less complex structural/ administrative context, there is a greater likelihood that you will see systemic effects. However, the range of resources to support capacity building efforts are often fewer in number than in larger school districts. Further, it takes fewer people who oppose an idea to be effective in stopping it. We strongly recommend that capacity building efforts in these settings start with relationship and trust building, and then proceed to planning that includes as many stakeholders as possible. Community support in these settings is key and the investment of start-up time is likely to be as great, but allocated differently, than in larger districts.

Link Change To Policy

In order for services, supports, and outcomes for students to improve, changes must be made in the policies that drive both general and special education. Change explicitly linked to policy tends to sustain and become more widespread than those changes that occur on a waiver, exception, or child-by-child basis. Becoming familiar with the policy arena and learning to leverage its power are crucial to large-scale change success.

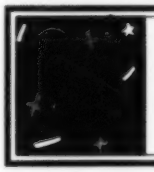
Key Strategy
Understand informal policies

Each state and district has unwritten, locally understood policies. Understanding these informal policies is as important as understanding the written policies. Sometimes someone with a vision is as good as a written policy. When you first go into a district it is important to learn: (1) the written policy; (2) the unwritten policy; and (3) the strong rumors. Often the rumors are more powerful than the written policy! Unless you clearly understand all three, you are operating at a disadvantage.

Key Strategy
Use frameworks to communicate and organize action steps

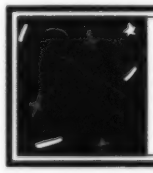
A framework for change is a useful roadmap for change agents and community members alike. It provides a common understanding of the potential avenues for change that can then be prioritized

according to local needs. A framework also provides a common language for discussion among stakeholders, and helps stakeholders focus on an immediate action step. The *Consortium* developed a policy framework that proved to be useful in its efforts to support change at the district and state levels (CISP, 1996; Roach, Salisbury, Strieker & McGregor, 2001). While this is certainly not the only framework available to guide the change effort, this policy framework exemplifies the benefits of basing the change process on a tangible, comprehensive understanding of the policy foundation of the existing system.



Key Strategy
Create informational feedback loops

Implementation of state education policy is affected by people's understandings of what was intended and what is possible. Often polices can have very different effects from what was originally intended. Stakeholders need to have opportunities to provide feedback to policy-makers about barriers to policy implementation. Policy makers need opportunities to explain the reasoning and flexibilities associated with state policy requirements. One of the most powerful strategies adopted by the *Consortium* was to create regular venues for policy-makers and local administrators to discuss policy implementation barriers and solutions (Roach, Salisbury, & Fisher, 2001). Superintendents, school board members, principals, parents, educators, state agency representatives, and state level policy makers were brought together in various combinations over time within each state involved in this project. Structured dialogue improved communication and understanding among stakeholders. These understandings informed actions and contributed to shifts in policies, structures, and practices at the state and district level.



Key Strategy
Address policy barriers

Understanding the policy environment is critical. While many types of policy barriers may contribute to "stuck systems," the source of resistance often relates to certification practices (how flexibly staff can be deployed with certain certificates), funding

(incentives and disincentives for inclusive services/ supports), and curriculum/ instruction (standards, graduation, grading).

If at all possible, change efforts should be aligned with the agendas of the State Board of Education, state education department, and district administrators. As a change agent, it is helpful to use a structured process to address existing barriers and keep desired outcomes clearly defined for yourself and others. These strategies will help provide a basic map to guide subsequent action at the state and district level. Becoming involved in study sessions, state board retreats, state education department task forces, and local district planning groups each create opportunities for input to occur. These policy arenas are where the "How does this work for all students?" can be repeatedly be interjected into the discussion.

Using these strategies, we were able to contribute to the change process at the state and district level with the following types of results:

- ☐ The state assessment system was changed so that districts could receive performance data for students with disabilities; districts were supported in their efforts to incorporate this information in the development of their comprehensive school improvement plans.
- ☐ The state funding formula was changed to eliminate incentives for out-of-district placements and to eliminate fiscal barriers.
- ☐ Funding "follows the child" from an out-of-district placement when a special education placement is made to a less restrictive setting in a local school district.
- ☐ At the state level, one state Department of Education created an eight-point strategic plan for inclusion that included existing and future actions related to finance, certification, professional development, curriculum, accreditation, and sharing successful practices.
- ☐ At the district level, the role of special educator was redefined, shifting from a focus on individual children only, to encompass responsibilities as a grade level instructional team member.
- ☐ At the district level, students with significant needs were enrolled in age-appropriate, general education classrooms according to natural proportions.
- ☐ At the district level, instructional minutes were used differently to promote collaborative planning among general and special education staff.

Use General Education as a Context

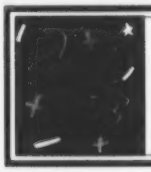
General education, whether at the state or district level, should be considered the referent context for discussions of inclusive educational practice. That is, general education structures, practices, and curriculum should serve as the context within which individualized services and supports are delivered to all children, including those with disabilities when general and special education policies align there is greater likelihood that inclusive practices will be supported and sustained.

Key Strategy
Focus on principals

Principals significantly affect capacity building efforts. In the experiences we have documented, change agents consistently identified the need to work closely at this level to create meaningful change in structures and practices within their buildings. Principals can be actively involved in capacity building efforts in several ways. Some desire full partnership in introducing a change in their building—from planning to analysis of the data to product design. Others prefer to be briefed about what is occurring, providing the necessary endorsement of activities in their buildings without getting involved on a day to day basis. The lack of experience and knowledge about inclusive practices is likely to affect their level of direct involvement in building and district level change efforts, but should not translate into no involvement.

It is imperative that priorities for support and participation be individualized to each principal. Recognize, too, that their level of participation will likely change over time. The goal is to promote a

sense of responsibility and ownership among principals for all students in their school, including those with disabilities. Enabling principals to visit other schools engaged in inclusive practices is a valuable strategy, enabling them to see practices in action and talk with other principals can be a valuable experience. Sharing building-level data to help inform their insight about inclusive practices in their school and raise their level of commitment for all learners is another effective approach to gain the involvement of the principal (McGregor & Salisbury, 2000; Salisbury & McGregor, (in press)). As principals gain experience in creating inclusive learning environments in their schools, they become effective emissaries to other districts, and as co-presenters of state and local conferences.



Key Strategy
Address attitudinal, as well as informational barriers

This is not as simple as it appears on the surface. Attitudinal barriers can affect our work as much as deficiencies in structures, policies, and practices. Attitudinal barriers can surface for a number of reasons—turf, professional practice, personal histories, historical practices, and/or concern about how inclusive practices will impact students and self. It is helpful to make explicit "old tapes" and ways of thinking that can constrain change and get in the way of trust building. We have found that being a "critical questioner," providing on-site support during the change process, and using both homogeneous and heterogeneous groups during staff development create safe venues in which attitudinal barriers can be addressed.

Inclusive thinking applies to professional and support staff, as well as to parents and students. The questions below help reframe traditional ways of thinking within discussions with general education partners.

- ☐ "How are all children going to be included in this initiative?"
- ☐ "Will this apply to all professionals in your school?"
- ☐ "What about parents of students with disabilities?"
- ☐ "Do our structures support the meaningful inclusion of everyone—staff, students, and parents?"
- ☐ "When you say 'all,' do you really mean all?"
- ☐ "How will our efforts to promote inclusive practices connect with our service integration, IEP, and transition planning initiatives?"

Key Strategy
Get Yourself to the General Educational Table

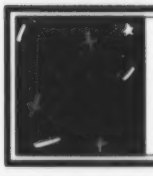
Opportunities to influence the thinking and decisions of general education policy-makers and administrators does not effectively happen unless you are at the table. Getting yourself to the table is often easier if you have entered through the general education door. Our experiences suggest that coming to the discussion as a special educator often puts you at a disadvantage because you are viewed as "having an agenda." You can turn this label to your advantage if you listen, learn, and then offer resources and information that support the priorities of those in the administrative area, yet raise issues about how their action steps will apply to all students.

When possible, enter through the general education door by developing partnerships with those in the areas of curriculum/professional development. These relationships afford natural opportunities for you to be invited to meetings where general educators address important issues such as high stakes assessment, standards-based reform, and performance standards for initial teachers. It is in these conversations that you can raise issues about the structures and supports that will be necessary to meet the needs of all learners, including those with disabilities. If you do not have a natural entree, asking someone in a leadership position to call and create an opportunity for you to attend a planning meeting is sometimes helpful. Alternatively, you can send a letter of introduction to key players and offer resources to support their planning.

Pitfalls and Difficult Situations

It is equally important to learn from difficult and unsuccessful experiences. In research, these findings are often referred to as lessons learned, negative exemplars, outliers, and non-examples. These findings hold value if we stop to interpret their meaning and learn why we got the result we did.

Below we provide guidance about pitfalls and lessons learned for those within and outside educational systems. The key point here is to understand these pitfalls—but not to use them as an excuse for inaction. Insights about why things are not working can provide important information to help you design an alternative strategy for promoting large scale change.



Challenge
Intractable issues, structures, and policies

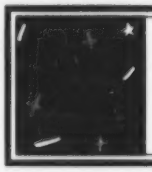
Despite intensive supports, some elements of the system are resistant to change. It can be helpful to try the following:

- ☐ Restate the issue in a broader context—it's not special education inclusion, it is about ensuring that all students meet high standards.
- ☐ Look for opportunities to leverage change at a different level in the system. For example, if a building principal is resistant, look to parents, district administrators, or the school board for support.
- ☐ Work on other areas of change until the barrier becomes the outlier, not the rule. For example, the curriculum and assessment is realigned to be inclusive, but the teacher certification policies don't allow the curriculum to be taught as intended.
- ☐ Create negative pressure. In

other words, change policy in an area that affects another part of the system that you really want to change. For example, changing the funding formula in a state can diminish the incentive to send students to segregated schools. As local districts take advantage of the fiscal relief, the number of students in segregated settings declines, which raises policy issues about the continued viability of these "separate schools."

- ☐ Change your terminology while pursuing the same goal. For example, refer to the agenda as "access to the curriculum," rather than "inclusion."
- ☐ Be flexible and be creative. If the cows are sacred to people that you respect, then leave them alone and/or find new ways to use them!

Some issues are best left alone. While structures may be a key factor in an inflexible system, changing some state structures may take more years and energy than you can afford. It is wise to learn which issues are least likely to garner political support from within the state and to pick your battles carefully.

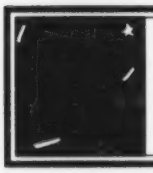


Challenge
Myopic focus and misguided direction

You can get a slanted picture of the situation depending upon your informant. As a result, your change model may not fit the context. The mismatch can create wasted time and energy for all involved.

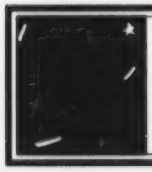
Entering through the special education door can make it more difficult for you to affect change with general education personnel at the state or district level. They will tend to see your efforts as a "special education agenda," and be less willing to explore how their programs can be made more inclusive. Where possible, create alliances with general educators and promote change from their side of the house.

Recognize that change is a time consuming process. It is imperative to listen, to respect the process, and to use the language of your clients. Stand in their shoes and appreciate successive approximations. A little progress is better than none, and results are relative to where you start!



Challenge
Turnover hurts

With turnover comes a loss in institutional memory. And, depending upon which personnel left, new initiatives may be introduced that usurp or run counter to your efforts. As noted earlier, building relationships broadly and working systemically can mitigate against set backs due to turnover.



Challenge
Litigation—asset or liability?

Inclusion by lawsuit can create opportunities, but also carries with it historical baggage. Anyone who has worked with districts and parents engaged in litigation will tell you that everyone involved is in a "world of hurt." A settlement is just that: The court renders a judgment and everyone has to live with it and no one really gets what they want. Do not underestimate how people feel. Do not take sides. Always go for a win/win resolution.

Summary

The information contained in this guidebook is intended to assist those involved in promoting large-scale change, specifically as it relates to issues of inclusive schooling practices. The collective understandings of the *Consortium* and our statewide systems change partners affirm the need for a systemically oriented, policy-linked approach to large-scale change. Efforts linked to state and district policy maximize the likelihood that changes will be sustained and will permeate across levels of the system. We have provided numerous strategies in this guidebook to assist you in establishing these links.

Table 1 summarizes the strategies and challenges across key areas of our large-scale change framework. Examples and supporting evidence have been provided throughout the guidebook to illustrate how these strategies can be applied at the state and district level.

It is our hope and expectation that this information will prove useful to others involved in promoting inclusive practices in state and local systems that support children and youth with and without disabilities and their families.

Table 1. Summary of Large Scale Change Strategies and Challenges

Develop Inclusive Philosophy, Policies, Structures, and Practices	Build Capacity	Approach Change Systemically	Link Change to Policy	Use General Education as a Context	Pitfalls and Difficult Situations
o Frame policy language and intent inclusively o Address barriers and resistance issues o Be intentional about broadening representation at the table	o Create inclusive staff development systems o Promote co-teaching o Leverage administrative supports o Use internal resources o Leverage external resources o Use data to make decisions o Market your success stories o Process matters o Understand the use the school year cycle	o Learn the context o Lead with your strengths o Ground change in local priorities o Focus concurrently on levels and components of the system o Focus on larger units of analysis	o Understand informal policies o Use frameworks to communicate and organize action steps o Create informational feedback loops o Address policy barriers	o Focus on principals o Address attitudinal, as well as informational, barriers o Get yourself to the general education table	o Intractable issues, structures, and policies o Myopic focus and misguided direction o Turnover hurts o Litigation—asset or liability

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